Session 2: Module 2 - Search Part 2

SCRIPT

Description	Text
Introduction	Welcome to M-SPIRIT Session 2, Module 2 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
Start	Participant Search and List – Part 2
On-site	There are 4 different databases you can perform a participant search in. These are listed in the Where to Search section and include: On-Site, Local, Statewide and Appointments for Today.
	We've already discussed the last 3 databases in Module 1. Now were going to talk about On-site.
	The On-site database is another subset of your clinic database and is created by staff at your clinic as participants are "checked in" using the Toggle Applicant/Participant On-site function.
<onsite>	We are going to take a look at the On-site functionality. So, let's search for the Sunshine family using their Household ID: 13500005.
	Click on the Household ID radio button to enable the field.
<onsite1>	Type 13500005 into the field and then press the Enter key on your keyboard or click the Search button.
<onsite2>	The Sunshine family arrived a little after 4 pm. We can check them in using the Toggle Applicant/Participant On-site function.
	You can perform this function from any of the clinic lists. However, you cannot toggle a participant on-site from the Statewide list.
	There are two different ways to toggle them on-site: via the Participant List menu or the icon.
	Click the Participant List menu to open it.
<onsite3>	The first option in the menu is: Toggle Applicant/Participant On-site.
<onsite4>	Otherwise, you can use the icon.
<onsite5>	Before checking a participant in, they must be highlighted in the participant list. Since Bailey is already highlighted, let's check her in first.
	Click the Toggle Applicant/Participant On-site icon.
<onsite6>	When the prompt appears, the **Applicant/Participant is On-site** checkbox is unselected by default. It must be selected to check the participant in.
	Click the checkbox.

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<onsite7>	Click the OK button.
<onsite8>	Both system-generated and user-defined alerts will automatically appear, if applicable, when a participant is checked in.
	Alerts will be reviewed in Session 3.
	Press your Enter key on your keyboard or click the Close button.
<onsite9>	Let's check Booney in.
	Click on Booney to highlight her record.
<onsite10>	Click the Toggle Applicant/Participant On-site icon.
<onsite11>	Click the checkbox.
<onsite12>	Click the OK button.
<onsite13>	Click the Close button.
<onsite14>	Nubbins is the last one to check in. Can you do it without any prompts?
<onsite15>	<no script>
<onsite16>	<no script>
<onsite17>	<no script>
<onsite18>	<no script>
<onsite19>	Nice work!
<onsite20>	You just added the Sunshine family to the On-site database.
	So, let's take a look at the On-site list.
	Let's start with a fresh screen. Do you remember how to refresh it?
<onsite21>	Like Appointments for Today, since the On-site list is a subset of your clinic database, you don't have to use any search criteria.
	Simply click the On-site radio button.
<onsite22>	...and press the Enter key on your keyboard or click the Search button.
<onsite23>	When a participant is added to the On-site list, the system time when they were checked in is recorded and displayed in the On-site Time column.
	This may be a helpful tool for clinics that have a lot of participants arriving and waiting for assistance.
	The other columns include: State WIC ID, Household ID, Last Name, First Name, Middle Initial, Date of Birth and WIC Category.

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On-site1	Participants in the On-site database can be removed from the list in 4 different ways. Two methods are automatically performed by the system and two can be performed by you.
	Any participants remaining on the list at the end of the clinic day are removed during the End-of-day processes that occur every night;
	Individuals are removed from the list once benefits have been issued to them;
On-site2	You can toggle a person off the On-site list; and,
	You can clear the entire list via the System Tools menu.
<onsite24>	Let's take a look at the two different ways that you can remove participants from the On-site list.
	If we wanted to remove Bailey from the On-site list, just like when we added her, we have to highlight her record in the participant list.
	Bailey is already highlighted. Next, simply click the Toggle Applicant/Participant On-site icon again.
<onsite25>	Notice the checkbox is selected this time because Bailey has already been toggled on-site.
	By clicking on the checkbox again and removing the checkmark, we can toggle her "off" the list. Do that.
<onsite26>	Click the OK button.
<onsite27>	Remember, whenever you use the toggle on-site function, the participant's alerts open.
	Press the Enter key on your keyboard of click the Close button.
<onsite28>	Bailey is still listed because the screen needs to refresh.
	However, we don't want to completely refresh the screen and reset the search screen back to default, which is what the Clear button does.
	Instead we can click the Search button to refresh. It will keep us in the On-site database view and the appropriate participants in the list.
	So, click the Search button to refresh.
<onsite29>	...and Bailey is no longer in the On-site list.

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	We can also remove all participants from the On-site list by using the option in the System Tools menu.
	Click on the File menu.
<onsite30>	Select System Tools.
<onsite31>	Select Clear On-site List.
<onsite31a>	<no script>
<onsite32>	A message displays that reads: Removing the names from the on-stie list cannot be undone. Are you sure you want to clear the on-site list?
	Click the Yes button.
<onsite33>	The participants have been removed from the on-site list.
On-site3	An option to work with the on-site group is available in the Activities menu.
	In the Work with On-site Group screen you can perform certain functions such as documenting group nutrition education class attendance and issuing benefits for multiple household members at one time without ever entering their participant folders.
	At this time, we are unsure how this functionality can be, or even whether it should be, utilized in Montana since all of our users have full access to participant folders and benefit issuance.
	In the future, if we identify this as an applicable function, we will provide training for interested agencies.
Note1	It should be noted that you can open participant folders from any of the participant lists. We will discuss opening the participant folder in the next session.
<show>	The Show Details button is one of the best tools M-SPIRIT has to offer.
	We need to search for some participants in order to show you the Show Details function. Let's search the Local database for participants with the last name of RAIN.
	Click the Demographics radio button…
<show1>	...and press the Enter key on your keyboard or the click the Search button.

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	Type RAIN (remember, the system will auto-capitalize for you) into the Last Name field and press the Enter key on your keyboard or click the Search button.
<show2>	<no script>
<show3>	Now, click the Show Details button.
<show4>	The Show Details panel opens at the bottom of the participant list screen and displays more detailed information about the participant currently highlighted in the participant list.
	The default participant list view is always to hide the details panel.
	If the Show Details panel were to remain open during searches, the detail it displays would slow the search down immeasurably.
	The list view always reverts back to hiding the details section whenever a new search is performed.
	When the Show Details panel displays, notice that the buttons label changes to Hide Details.
	Click the Hide Details button.
<show5>	...and the Show Details panel no longer displays.
	The button toggles the view between Show Details and Hide Details.
	Click the Show Details button again.
<show6>	Let's look at someone who has some details. Click on SADI RAINDROP to highlight.
<show7>	The Show Details panel displays the following for the participant highlighted in the list: WIC Category, gender, their Next Appointment scheduled, and their telephone number.
<show8>	The second column in the panel displays: the Certification Effective date, the Certification End date, their Termination Date and Termination Reason if applicable.
<show9>	The third section in the panel has benefit issuance information, including the Last Date to Use of the last sets of benefits issued and their Issuance Frequency.
	Click on BLUEBIRD RAINDEW in the participant list to highlight.
<show10>	Bluebird's next appointment is at 9/20/2010 at 8:45 AM. (Today is 9/16/2010.)

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ShowAppt	The Show Details panel displays appointment information if you are using the M-SPIRIT appointment scheduling software.
	If the participant has multiple appointments scheduled, only the next appointment's date and time are shown.
Note2	It is important to note that the Next Appointment field in the Show Details panel displays appointments even if scheduled at another clinic. It does not display at which clinic the appointment is scheduled.
ShowAppt1	When a participant is transferred into your clinic their appointment information does not automatically delete.
	If they had an appointment at the clinic they transferred from, the appointment will continue to display in the Show Details section.
<show11>	Notice that most of the details are N/A for Bluebird Raindew.
	This is usually an indication that the participant has only been **prescreened**, which means they have been added to the Montana WIC database but have not yet been certified for the WIC program.
	Now click on SKY RAINS.
<show12>	Her last certification record started on 9/01/2009 and ended on 10/31/2009 – the last day of the month in which she turned five.
	Since Sky is a 5 year old, her record will be purged from your clinic database during End-of-Day (as we learned in Session 1) after 6 months of inactivity.
	However, notice that she has a Termination Date and Reason listed.
	The Termination Date and Termination Reason display if the participant has been either terminated by a CPA or auto-terminated by the system.
ShowTerm	It is important that you always check the Show Details panel. Especially, if you are unable to issue benefits or perform some other function in the participant folder, since it may be due to the system auto-terminating the participant.
	You can always reverse a participant's termination as long as they are still in a current certification period. We will show you how to reverse the termination in Session 6.

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Important	It is important to remember that M-SPIRIT auto-terminates participants if they fail to pickup for two months in a row or if they are not recertified within 31 days of their most recent cert end date.
<show13>	Now click on SPARROW RAINDEW.
<show14>	The Last Date to Use section displays the last sets of benefits issued by M-SPIRIT and the participant's current Issuance Frequency.
	If an entire set of benefits is voided, instead of Issued...
<show15>	...Voided would display next to the Last Date to Use of that set.
<show16>	The most recent set issued always displays at the bottom.
ShowLDTU	The Last Date to Use, or LDTU, is the last day a participant can redeem the benefit at a store, which is printed on each benefit.
	To determine which month a set of benefits was issued for simply subtract one month from the Last Date to Use.
	For example, an LDTU of 12/15/10 means that the last set of benefits were issued from 11/16/10 - 12/15/10 and that the participant received November benefits but has yet to receive December benefits.
	A lot more detailed information about the Last Date to Use and benefit issuance will be provided in Session 7.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.